FY2026
Notice of Funding Availability

Building Stronger Businesses Together

Small Business Technical Assistance Grant Program

Growth Capital Program

MassDevelopment

Investing in Partners Empowering the Small Businesses Ecosystem
FY 2026 SMALL BUSINESS TECHNICAL ASSISTANCE GRANT PROGRAM
REQUEST FOR PROPOSALS

Address: MassDevelopment, Community Investment Division
99 High Street, Boston, MA 02110

RFP File Name: Small Business Technical Assistance Grant Program,
Growth Capital Program

Contact Person: Rachel Powers, rpowers@massdevelopment.com

Please submit all questions and inquiries via email to the contact person listed above.

<u>**Schedule**</u>:

RFP Release Date:	**Wednesday, September 3, 2025**
Deadline for Proposals:	**Thursday, October 9, 2025 @11:59PM**
Information Sessions: (Virtual)	**Friday, September 12th @11:00 am** **Tuesday, September 16th @1:00 pm** **Thursday, September 18th @10:00 am**
Office Hours: (Virtual)	**Thursday, September 25th @10:00 am** **Tuesday, September 30th @11:00 am.**
RFP and Application via: Submittable Platform accessible on https://mgpsbtaprogram.submittable.com/submit	
Grants will be awarded:	**November - December (subject to change)**

Notices of funding availability through this RFP will be sent via email to past and current program awardees, members of the State Legislature, MACDC's members and posted at MassDevelopment.com.

COMPLIANCE WITH FEDERAL FUNDS, LAWS AND REGULATIONS
Applicants must comply with all applicable laws.

TECHNICAL SUPPORT ON SUBMITTABLE
Visit the Help Center: https://www.submittable.com/help/submitter/

OTHER QUESTIONS: Contact MassDevelopment
Email: rpowers@massdevelopment.com

The Small Business Technical Assistance Grant Program("SBTA") is dedicated to expanding access to advising services, workshop training, loans, grants, and resources for Massachusetts' small and micro businesses, while supporting capacity building of the nonprofits who serve them.

The program provides grants of up to $150,000 to certified Community Development Corporations, certified Community Financial Institutions, and other nonprofits with established community-focused small business technical assistance programs. Such programs deliver and fill gaps in essential services with the mission of building local ecosystems comprised of fellow nonprofits, neighborhood organizations, municipalities, for-profits and beyond that provide a continuum of services, supporting business creation, growth, and stabilization in our communities.

Program Goals:
- Expand the availability and quality of technical assistance for small and microbusinesses.
- Build organizational capacity among nonprofit providers serving small businesses.
- Increase equitable access to capital, advice, and resources for historically underserved entrepreneurs.
- Strengthen local and regional small business ecosystems across all Massachusetts communities.

Grant Requirements:

Nonprofits with established small business services can apply for funds provided that their proposed programming advances growth and stability for businesses with fewer than 20 employees and no more than $2.5 million in annual revenue.

Each application must describe a **comprehensive one-year workplan** which details proposed programming, engagement and assessment of clientele, integration of services with consultants and partners, a formalized plan around collecting data and tracking outcomes, language capacity, a proposed budget, as well as organizational experience and capacity. Proposed programming must include a range of services including one-on-one technical assistance, comprehensive business skills workshop training, and improved access to financing options. Any programming offered must address the needs of businesses, with a focus on job creation and economic growth.

Program Benchmarks	Action
FY26 SBTA RFP Release	September 2025
Full Application Submission	Applications Submitted
FY26 SBTA RFP Grant Award Notifications	Funding Approval Notifications
Mid-Year Reporting	Review of mid-year projections to actuals
Final Reporting	Final Reports Due:

	• Expense Report • Impact Report

PARTNERSHIPS/ECOSYSTEM

Grantees under the SBTA program will work closely with partners including municipalities, industry experts, banks, and a range of professionals in accounting, legal, and marketing to help businesses resolve challenges, manage operations, and position themselves for growth. Together these partners form an ecosystem comprising a continuum of services critical to ensuring that small and microbusinesses have access to the guidance needed to start, grow and succeed.

Examples of Partnerships that strengthen service deliveries for small business ecosystems:

Partner Type	Examples of Partnership
Technical Assistance (TA) Providers (e.g., CDCs, small business nonprofits)	Deliver direct business advising, workshops, and 1:1 technical support
Community Development Financial Institutions (CDFIs)	Provide access to affordable capital, loan readiness support, credit advising
Municipalities / Economic Development Departments	Connect businesses to permitting, grants, city contracts, and local initiatives
Chambers of Commerce / Business Associations	Offer peer networking, advocacy, customer growth opportunities, B2B connections
Legal and Compliance Partners (e.g., legal aid clinics, pro bono attorneys)	Assist with entity formation, contracts, regulatory compliance
Accounting and Financial Planning Services	Support cash flow management, tax compliance, financial projections
Workforce Development Agencies	Assist businesses in recruiting, training, and retaining staff
Marketing and Digital Strategy Firms (small biz friendly)	Help with branding, website development, digital marketing
Industry Experts and Sector Specialists (e.g., food business, childcare, tech)	Provide sector-specific advising and growth strategies
MassDevelopment - Business Development Staff	Expertise to help drive business growth
MassDevelopment - Growth Capital Lenders	Lending products to help finance capital projects, purchase new equipment and expand
MassDevelopment - TDI District Fellows	Place-based economic development program for Gateway City downtowns and commercial districts.

TECHNICAL ASSISTANCE (TA) SUBJECT AREAS AND ACTIVITIES

The SBTA program funds nonprofit organizations that provide:
- 1:1 business advising
- Cohort-based technical assistance
- Training workshops and seminars

Focus Areas:
- Business Readiness and Formation
- Financial Health and Capital Readiness
- Market Access and Customer Growth
- Organizational Capacity Building

Technical Assistance Grant Activities

Examples:

Technical Assistance Grant Activity	Description of Technical Assistance Grant Activity	Measurable Outcomes & Progress
Focus Area: Business Readiness and Formation		
Business Plans Creation	Educate on developing comprehensive business plans or sections of it • Market research and competitive analysis • Finanacial projections Provide strategies on implementing plan or sections of the plan.	Outcome: *Business Plan Created* • Track milestones and adjust strategies for achieving goals
Business Creation	Guide on starting a new business	Outcome: Entity's Legal Structure Created (LLC, Partnership, Corporation, etc) • Educated about the best legal structure for business-type
Legal Compliance	Educate on relevant business laws and regulations. Provide advice on licensing, permits, and contracts	Outcome: Obtain Certifications, Licenses & Permits Increase Regulatory Compliance

		• Ensure ongoing compliance and adapt to regulatory changes
Focus Area: Financial Health and Capital Readiness		
Financial Management	Teach basic understanding of financial statements to increase owner's ability to better manage the business • Income statement • Balance Sheet • Cash flowBudgeting and financial forecasting Provide strategies and advice on how to choose a bookkeeper, accountant, systems, preparing to secure fundining, securing funding.	<u>Outcome</u>: Creation of Financial Statements • Monitor financial health-cashflow improvements Bookkeeper/Accountant is hired • Maintenance of financial records
Risk Management	Teach identification of potential risks and development of mitigation strategies	<u>Outcome</u>: Achieved Profitability/Achieved Business Stabilization • Assess risk management effectiveness and update plans • Monitor financial health-cashflow improvements
Direct Loans	Educate on available loan options and application processes Provide advice on selecting the right loan for business needs Offer advice on presenting a strong case to lenders	<u>Outcome</u>: Access to Capital/Obtained a loan Achieved Post Loan Success • Business stabilization and/or growth
Loan Packaging	Guide on preparing loan applications and necessary documentation	<u>Outcome</u>: Access to Capital/Achieved Loan Readiness

|		
		• Track loan approval rates across businesses
Stabilization	Educate on maintaining business stability Helping business remove operational challenges and hurdles	Outcome: Reduction of Losses/Increasing Revenues • Track and implement corrective actions
Focus Area: Market Access & Customer Growth		
Marketing Strategies	Educate on the importance of a marketing plan and marketing budget to increase market share, branding, and sales Help to create and implement marketing plan	Outcome: Creation of or Implementation of a Marketing Strategy • Evaluate marketing impact and refine strategies
Growth and Expansion	Educate on strategies for business growth Provide insights on entering new markets and scaling operations	Outcome: Increase of Revenue, Sales, Production, Square Footage, and/or Customer Base and/or Job Creation • Track Growth
Focus Area: Organizational Capacity Building		
Operations Management	Assess the root causes of operational challenges	Outcome: Improved Business Practices • Measure operational performance and optimize processes
Access to Networks and Partners	Educate on connecting with industry experts, banks, municipalities, and professionals Recommend valuable partnerships and resources	Outcome: Increase of Professional Network • Fostering partnerships and collaboration that leads to business growth
Training Workshops	Educate through specialized training sessions	Outcome: Enhanced Resilience and/or Innovation

Mentoring	Offer guidance through experienced mentors Provide personalized advice based on mentor-business matching program	Outcome: Increased Access to Resources & Opportunities Increased Confidence, Knowledge Sharing and foster continuous collaboration
PeerSupport	Facilitate peer-support networks Advise on leveraging peer experiences and knowledge	Outcome: Access to Practical Advice and Insights Increase Confidence, Knowledge Sharing and foster continuous collaboration

REGIONS & COMMUNITIES

The SBTA Grant program is available to eligible organizations throughout the state. Due to historically low rates of BizMPower Grant awards in the Central and Western regions of Massachusetts, applicants from these underrepresentated regions may be given priority consideration when making awards.

☐ Statewide
☐ Central*
☐ Greater Boston
☐ North
☐ South
☐ West*

For a detail list of cities, visit: https://massdevelopment.com/about/regional-offices/
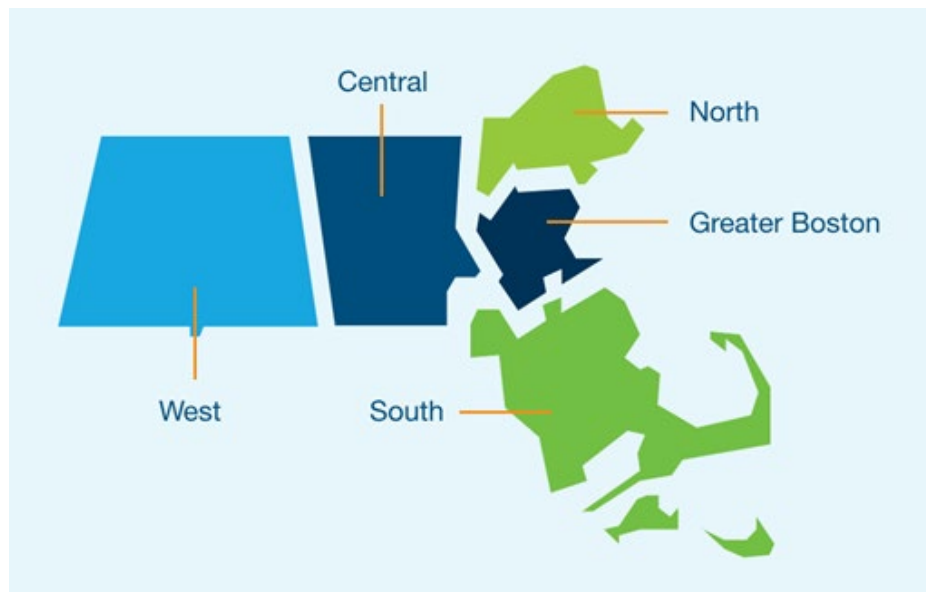
GRANT AMOUNTS AND DISTRIBUTION

Awards will seek to reflect the geographic diversity and varying economic development needs of the Commonwealth but will not limit the number of grants per region. Awards for proposals will not exceed $150,000.

ELIGIBILITY
Eligible Applicants

Program	Eligibility	Award Amount	Uses
Small Business Technical Assistance Program	☐Certified CDFIs ☐Certified CDC ☐Nonprofit community-based organization	Up to $150,000	To support established small business technical assistance programs serving businesses with 20 or fewer employees, including: ☐ One-on-one technical assistance ☐ Cohort-based technical assistance ☐ Training & workshops

For purposes of the SBTA Grant Program and this Request for Proposal (RFP), only Massachusetts-based, not-for-profit corporations are eligible for program participation. For the purposes of this program, the entity shall:

1) Be duly organized under Massachusetts General Laws, Chapter 180 and incorporated as such by the Secretary of State for the Commonwealth of Massachusetts, whose mission includes facilitating a community driven economic development process for small businesses.
2) Hold a tax-exempt status under the United States Internal Revenue Code.
3) Demonstrate an ability to develop and manage programs as reflected in the effective functioning of the Board of Directors, operations managed by a full-time and experienced management team, involvement of and responsiveness to community residents and constituents.
4) Provide evidence of fiscal stability, as documented in prepared financial statements.

Eligible Programs

At least 85% of the clients served by the awardee organization with SBTA funds shall be for clients who are already operating an existing business; no more than 15% of clients shall be those who are within twelve months of opening a new business. Counseling and training programs should be designed to aid small business owners in stabilizing and growing their businesses in measurable ways through intensive individual counseling/coaching, selective group training, loan packaging, and direct lending or loan guarantees. The availability of these services, programming and lending opportunities, must be advertised and listed prominently on applicants' websites.

Grant proposals should define the communities they serve, the strategy and marketing plan to reach these communities, current and planned programs, and performance benchmarks and metrics. Grant proposals shall identify specific counseling and training programs that assist these small businesses to:

- Prepare financial statements and secure new or increased financing for growth.
- Make a business plan to achieve stability and viability.
- Support the fundamental operations of forming a business
- Support businesses applying to the Biz-M-Power Grant program (MassDevelopment Program)

Organizational workplans providing educational services around bookkeeping are highly desirable, particularly as they prepare small businesses to access capital.

Priority Considerations

Priority considerations will be given to proposed programs that:

Priorities	Categories
Support small business clients from predominantly socially and economically disadvantaged and historically underrepresented groups	❑ Minority-owned businesses ❑ Women-owned businesses ❑ LGBTQ+-owned businesses ❑ Non-native English speaking-owners ❑ Small businesses operating in Gateway Cities ❑ Rural communities ❑ Low-moderate-income individuals ❑ U.S. Military Veterans ❑ Businesses operating as cooperatives ❑ Businesses governed by Employee Stock Ownership Plans ❑ Disabled individuals ❑ Servicing underserved markets
Demonstrate direct high touch interactions which advance:	❑ New business startups ❑ Business expansion ❑ Business stabilization ❑ Increased access to financing ❑ Other proposed measurable economic growth
Language Capacity	❑ Offer multilingual program support, especially Spanish.

INELIGIBLE ACTIVITIES

The SBTA Grant Program will not fund projects or activities that:

- Result in the profit of for-profit enterprises.
- Primarily intended to serve prospective business ventures, defined as individuals who are more than twelve months from beginning to operate a business.
- Do not produce measurable status outcomes relating to business stabilization and growth.

MassDevelopment reserves the right to reject any and all submitted proposals and any or all parts of a proposed activity.

SELECTION CRITERIA
Application Evaluation Process
MassDevelopment will select grant recipients through this competitive application process. The Agency's review committee will confirm applicant and project eligibility and evaluate proposals. The strongest applications will align closely with program goals and include all required documentation at the time of submission. Incomplete applications may not be considered. Applications will be reviewed for:

- Alignment with program funding priorities
- Experience and capacity to be responsive to current needs
- Track record, compliance with previous SBTA awards and historical impact
- Comprehensive Technical Assistance services
- Proposed Outcomes
- Application completeness

Applications must demonstrate the ability to meet the following small business assistance priorities in order to receive funding:

1) Provide a strategy for addressing small business needs in the applicant's target market.
2) Provide a minimum of 5 hours of direct services to small business clients from target populations.
3) Implement coordinated services that magnify the delivery of services in efficient, economical, and effective ways over a 1-year period. Preference will be given to applicants that can demonstrate strong collaborations with microlenders or whose funding will support microloan fund clients.
4) Enhance and complement government service providers, such as Small Business Development Centers.
5) Collect and report on specific outcomes achieved that can be attributed to services provided, including business starts, financing made or facilitated, businesses stabilized, jobs created or retained, and/or revenue growth.

Required Documentation
Application submissions must exhibit completeness and contain all requested documents, including but not limited to:

❑ The Applicant's 2025 Certificate of Good Standing as issued by the Secretary of the Commonwealth (**and NOT the Department of Revenue**) and/or the equivalent to be accepted at the discretion of MassDevelopment
❑ Resumes of Key Personnel, Partners and Consultants, as applicable
❑ The current roster of the Applicant's Board of Directors
❑ U.S. IRS Tax Exempt Certification
❑ Most Recently Audited Financial Statements or Review
❑ Current Year-to-Date Financial Statement consisting of the Income & Expense and Balance Sheets

Failure to submit a complete application with all pertinent materials will result in a reduced score and/or denial of FY26 SBTA Funding.

SCORING MATRIX

The review process is designed to evaluate using a points system with a maximum score of 100. This process will ensure a thorough and fair evaluation of applications, prioritizing those that demonstrate strong alignment with program goals and readiness for implementation of their proposed lending and loan-readiness TA workplan.

CRITERIA	Maximum Points
1. Mission & Services Alignment	10
2. Community Knowledge	10
3. Experience & Capacity	10
4. Proposed Program	13*
5. Client Engagement	10
6. Small Business Ecosystem/Partnerships	5
7. Work plan Integration	5
8. Budget Alignment	5
9. Credible Outcomes	6
10. Multilingual Services	10
11. Application Completeness	4
12. Legislative Preferences	12
Total points	100

*May include up to 3 bonus points for meaningfully serving a priority region

Scoring-Based Recommendations

Only applications scoring 80 points or above will advance to the next round of review.

80 – 100: Recommended for an award. Demonstrated strong alignment with program goals and mission.

75 – 79: May be considered for an award if program is not oversubscribed. Applicants will be engaged for clarification. If clarifications are deemed justified, applicants will be recommended for an award.
74 and Below: Not Recommended for an award – needs substantial revision to demonstrate strong alignment with program goals and mission.

GRANT TERMS

All proposals become public documents, to the extent required under Massachusetts public records laws. If a proposal is approved for funding, the proposal, the attached work plan and budget shall serve as the basis for grant award disbursements including the precise project scope, budget and use of funds enumerated in any Grant Agreement.

Grant Agreements will cover a 1-yr period and contain a requirement that Awardees release names and contact information of clients served for the purposes of outcome verification. Awardees also agree to cooperate with any third-party evaluation that MassDevelopment may decide to undertake of this program.

REPORTING
MassDevelopment will require a final report on performance, demographic, and outcome data. See *Appendix B* to the Application. All reports and files must be submitted through Submittable.

Final reports will include the following elements (subject to modification):
- Narrative that references proposal Workplan and answers: What worked well, what did you learn, and what were the challenges in providing assistance to your small business clients and achieving your goals?
- Description of methodology used for verifying performance outcome data, including which indicators were used to validate business start-up, stabilization, growth, job creation and retention, and how follow-up was conducted (phone, internet, face to face; survey, interview, document verification, etc.)
- Transactional-level data identifying each small business assisted and relevant data points including their business type, location, and the type(s) of technical assistance provided.
- Changes in key staff or organizational changes that impact the small business program during the grant period. (Resumes for key staff to be required)
- Description of partnerships developed with other organizations (i.e. other MassDevelopment awardees, financial institutions, funders, peer-to peer, city programs, etc.) during the grant period.
- List of media attention received or organized events related to this grant. Media refers to: print (newspaper, newsletter, flyers, etc.), TV, radio, social media (Facebook/twitter/LinkedIn).
- Professional development that the business technical assistance provider(s) attend during the grant period.
- Business success story that illustrates a business in start-up, stabilization or growth stage and the economic impact of the provision of technical assistance services. It should include a brief description and relevant history of the business and the business owner, challenge, technical assistance solution and the economic impact.

Reporting requirements and deadlines will be contained in the Grant Agreement.

DISBURSEMENT OF FUNDS
Following completion of all required forms and receipt of an executed grant agreement, awarded grants will be distributed on a quarterly basis to successful applicants. Disbursement of Funds is contingent on compliance with mid-year and final program reporting requirements. Twenty-five percent of approved funds will be held back pending receipt of final program reporting.

USE OF FUNDS – LIMITATION OF ADMINISTRATION COSTS
Administrative costs associated with the SBTA Grant Program may not exceed 10% of the proposed MassDevelopment allocation request.

SUBMISSION GUIDELINES
Any materials submitted will become the property of MassDevelopment and must be made available for reproduction and may not be copyrighted. Application submissions will be accepted only via the Submittable Platform accessible on: https://mgpsbtaprogram.submittable.com/submit

Submissions
Applications will be accepted beginning **September 3, 2025 until 11:59 p.m. October 9, 2025** via Submittable. A completed application and supplemental information will be required to be uploaded and submitted. **Late applications** will not be accepted.

![Submittable logo]

Submittable streamlines the application process by allowing you to upload all required documents in one place for quick and efficient submission. You will need to create an account to access and submit an application. **Program application is only available online via Submittable.** After submission, applicants can track the status of an application and receive updates to stay informed.

FY25 Award Process and Timeline

Award Benchmark	Date	Action
RFP Release	September 3, 2025	Applications Open
Submission Deadline	October 9, 2025 11:59 p.m.	Application Due
Application Review Period	October 14, 2025 – November 2025 (Estimate)	Grant applications reviewed & requests for minor clarifications
Grant Award Notifications	December 1, 2025 (Estimate)	Funding Approved
FY26 Reporting Deadline	June 12, 2026	FY26 Reports Due: • Expense Report • Impact Report

Submittable Application: https://mgpsbtaprogram.submittable.com/submit

FY26 Application SBTA Grant Program

Organizational Information

EIN:
Organization Name:
Headquarters Address:
Service Delivery Address (if different)
Website*:
*Website must list lending and TA Services

My organization will provide at least 5hrs total of services to business owner(s) in order to address identified challenges. When appropriate, business owner(s) may be referred to partners to resolve and/or better position business to thrive.	
Check all proposed services that apply:	☐ One-on-one technical assistance ☐ Cohort-based technical assistance ☐ Training programs

Eligibility: Nonprofit Lender and/or SBTA provider	
Applicant Entity Type	☐ Certified CDFI ☐ Community Development Corporation ☐ Nonprofit Community-based Organization, explain:

Services Your Organization Provides

☐Small Business General Technical Assistance Provider

☐Small Business Loan-Readiness Technical Assistance Provider

☐Small Business Post-Loan Technical Assistance Provider

☐Microloan Lender

☐ Small Business Lender

☐ Financial Management/Bookkeeping

☐ Marketing/Advertising

☐ Small Business Loan Packaging for other outside of organization loans

☐ Provide co-working space for businesses

☐ Creating/Updating Business Plan

☐ Obtaining Certifications, Licenses and/or Permits

☐ Emergency Loans

☐ Workforce Training

☐ Financial Literacy Programming

☐ Referrals to Legal Aid, Tax Professionals, etc

☐ Increasing Food Access in Areas Designed as Food Deserts

☐ Health Programming

☐ Programming for Youth

☐ Residential Green Product Lender

☐ Residential Home Improvement Lender

Geographic Area Served

☐ Statewide
☐ Central*
☐ Greater Boston
☐ North
☐ South
☐ West*

For a detail list of cities, visit: https://massdevelopment.com/about/regional-offices/

* Applications demonstrating a meaningful strategy in how they will serve these regions, showing how they have served these regions previously, within their Proposed Work Plan, may be eligible for 3 additional points

Please list the top 10 cities or towns that you served. This is for referral purposes and the Agency's ability to connect applicants with other programs and initiatives.

Request Amount:
☐ Individual organization application, up to $150,000

Narrative- Proposed Work Plan

<u>Overview</u>
SCORING: Mission & Services alignment - Funding Request Alignment with Mission, Services & Program Goals

1. Describe the mission of the applicant organization, the community it serves, and its outreach strategy. For organizations with a statewide mission, do you focus on a particular region(s) for small businesses, and if so, which ones?

2. How does your organization's mission align with the goal of increasing access to TA for small and microbusinesses, prioritizing socially or economically disadvantaged businesses?

3. What percentage of your organization's programs/services serves small and microbusinesses with fewer than 20 employees and revenues not exceeding $2.5 million?
   ☐ Above 70%
   ☐ Between 60-69%
   ☐ Between 50-59%
   ☐ Between 40-49%
   ☐ Between 30-39%
   ☐ Below 29%

<u>Workplan: Proposed Grant Program & Activities</u>
SCORING: Proposed Program - Quality of technical assistance programming/ Demonstration of direct high touch interactions

4. What TA services will your organization provide to small businesses?

5. Describe the proposed program and its related activities. The proposal must include a program description that is reflected in the work plan, and which clearly explains the proposed budget.

6. Describe how your lending, technical assistance, and program activities vary to reflect the specific needs of each region's small business community. If you serve multiple regions, why are your solutions unique to a particular region(s)?

7. If applicable, what is your small business mission and strategy around serving Central and Western MA Target Markets? How do you meaningfully propose to serve those regions, and what have you done previously?

8. Describe the various ways by which the applicant organization first engages clients, triages the services they require, and refers them to other service providers if unable to assist them. Also describe how the applicant organization moves clients forward once they have received all available services.

9. Workplan Table: Please outline proposed program- related activities and outcomes, as is reflected in the proposed work plan, detailing the responsible parties charged with leading various activities and how small business clients are triaged into the program.

Activity	Outcome	Applicant Organization Staff involved in this activity	Partner(s) involved in this activity	Consultant(s) involved in this activity (if applicable)

10. Does your organization serve worker cooperatives and/or businesses governed by employee stock ownership plans? If so, describe how your organization prioritize these small businesses?

<u>Client Engagement</u>
SCORING: Client Engagement: Clarity of Business Engagement/Assessment Process

11. Does the organization engage in needs assessments to better provide individualized solutions?

11a. Describe your needs assessment process.

<u>Business Community Challenges</u>

SCORING: Community Knowledge- Applicant Demonstration of Knowledge of Challenges Faced by Community/Target Populations

12. Based on the applicant's target market/populations, describe the issues they face with business development, securing financing and achieving financial viability.

13. When serving multiple regions, in what ways are your solutions tailored to address the unique challenges and opportunities of each community?

14. Describe how your proposed work plan (organization's technical assistance role, training and counseling programs, or other initiatives with the small business community that) create, maintain, and grow the business's financial viability, ability to obtain private or public financing and/or create jobs.

<u>Staff Qualifications</u>

SCORING: Experience & Capacity - Readiness to deploy funds and clear Implementation Plan

15. Describe the professional qualifications of the small business assistance professionals on staff and consultants regularly used for client referrals.

Staff Name	Title	Experience	Spoken Language(s)

<u>Partnerships and Collaboratives</u>

SCORING: Work Plan Integration - Proposed Activities and Services, and Expected Outcomes are Clearly Integrated.

16. Detail partnerships and collaborations that support the applicant's program, including but not limited to, how the applicant partners with their regional SBDC and other providers, including

legal, accounting, tax professionals, marketing specialists, private and government lenders, and micro-lenders. Please use the Partners Forms to provide this information.

Small Business Ecosystem – Organization Types	Name of Collaborative/Partner Organization	Description of Collaboration
Regional Small Business Development Center		
Legal Aid		
Tax Professionals		
Marketing Specialists		
Private Government Lenders		
CDFI or CDCs Lenders		
Municipalities		
Other		

Multilingual Services

SCORING: Multilingual Services - Language Capacity to assist Non-native English Speakers

17. If your organization provides multilingual services, describe your outreach strategy and efforts to reach non-native English speakers. List all languages available on site to engaged borrowers.

Budget

SCORING: Budget Alignment- Alignment of Budget with Proposed Work Plan Activities

1. Describe how Small Business Technical Assistance Grant Program funding will be used to support the proposed program. SBTA funds are intended to supplement current and anticipated funding and not to be the primary funding support. If funding from the Commonwealth of Massachusetts will support the proposed program, please articulate how SBTA funding will not be duplicative. *See Appendix A for Organizational Budget Form and Appendix C for Expense Report.*

2. Have all FY25 Grant Funds been expended as outlined in the FY25 Organization Budget Form?
   - □ No
   - □ Yes

3. Were more than 10% of the FY25 Grant Funds expended on administrative costs?
   - □ No
   - □ Yes

Proposed Activity Outcomes
SCORING: Credible Outcomes- Applicant Expresses Credible Plan Around Collecting Program Data and Outcomes

<u>Expected Program Outcomes</u>

1. What is the average number of hours of TA support your organization provides per business?
   - □ 0 – 4 hours
   - □ 5 hours
   - □ 6 – 8 hours
   - □ 9+ hours

2. What percentage of small businesses served by your organization receive 5 or more hours of technical assistance?
   - □ Above 70%
   - □ Between 60-69%
   - □ Between 50-59%
   - □ Between 40-49%
   - □ Between 30-39%
   - □ Below 29%

3. Describe the small businesses your technical assistance services will support, including business characteristics (types of businesses, business phases, geographic locations), the estimated number of businesses to be served, anticipated number of hours of support per business and types of support to be provided (financial planning, marketing, legal assistance, etc). Please also include the basis for these projections.

4. How does your organization define and measure outcomes for the small businesses you support across the following stages: Prospective (idea generation, prototyping, no generated revenue), Pre-Start-Up (incorporation, revenue generation, hiring FTEs), Start-up (business registration, first sale, securing capital), Stabilization (consistent revenue, improved operations,

debt management), Expansion (hiring staff, entering new markets, increasing revenue), and Declining (decreasing revenue, cash flow issues, increased debt)? For each category, please provide your working definition, describing the indicators or metrics you will use to assess progress. Share any historical data or benchmarks that support your approach.

5. Describe your organization's methodology for collecting and reporting on performance, demographic, and outcome data.

6. Utilize the table below to project the number (#) of businesses that will be impacted by your proposed workplan. *See Appendix B for Transactional Report Form.*

Small Businesses Impacted	FY25 SBTA Outcomes	FY26 SBTA		Explanation: Discuss the reason behind any changes, gaps, etc.
	Actuals	Proposed	Actuals	
Proposed # of businesses that will engage in technical assistance				
Proposed # of Prospective businesses				
Proposed # of Businesses in pre-start-up phase				
Proposed # of Businesses in start-up phase				
Proposed # of Established businesses				
Proposed # of Businesses created				
Proposed # of Businesses stabilized				
Proposed # of Businesses that grew/increased revenue as a result of services				
Proposed # of Businesses that did not report positive outcome (including on-going clients)				
Proposed # of full-time jobs preserved				
Proposed # of full-time jobs created				
Proposed # women-owned businesses				
Proposed # minority-owned businesses				
Proposed # of immigrants/non-native English speakers				
Proposed # of low-moderate income business owners				
Proposed # of businesses located in low-moderate income communities				
Proposed # of businesses that will receive direct or indirect financing				

Proposed total financing ($) that businesses will be secure				
Proposed # of businesses structured as cooperatives				
Proposed # of businesses governed by ESOPS				
Proposed # of worker-owned cooperatives				
Proposed # of consumer-owned cooperatives				

APPLICATION REQUIRED DOCUMENTS (UPLOADS)

1. Proposed Organizational Budget Form (See Appendix A)
2. Resumes of key personnel delivering direct service
3. 2025 Certificate of Good Standing from the Secretary of the Commonwealth
4. Current Board of Directors list
5. U.S. IRS Tax Exempt Certification/ Determination Letter
6. Most recent Audited Financial Statement or Review
7. Current year-to-date organizational Financial Statement: Income & Expense/Balance Sheet

DEFINITIONS

Biz-M-Power: MassDevelopment Matching Grant Program designated for growth-oriented businesses with fewer than 20 employees and no more than $2.5 million in revenues. The program aims to help small and microbusinesses offset the costs of acquisitions, expansions, improvement or lease of a facility, purchase or lease of equipment, and other capital needs.

Community Development Corporations (CDCs): Certified under chapter 40H of the General Laws.

Community Development Financial Institutions (CDFIs): Certified by the United States Department of the Treasury.

High touch interactions: Defined as 1) one-on-one or 2) cohort-based technical assistance, with *supplementary* training workshops, providing a minimum of 5 hours of direct services to each small business assisted.

Rural Communities: Towns with a population density of 500 persons per square mile and/or a total population less than 7,000.
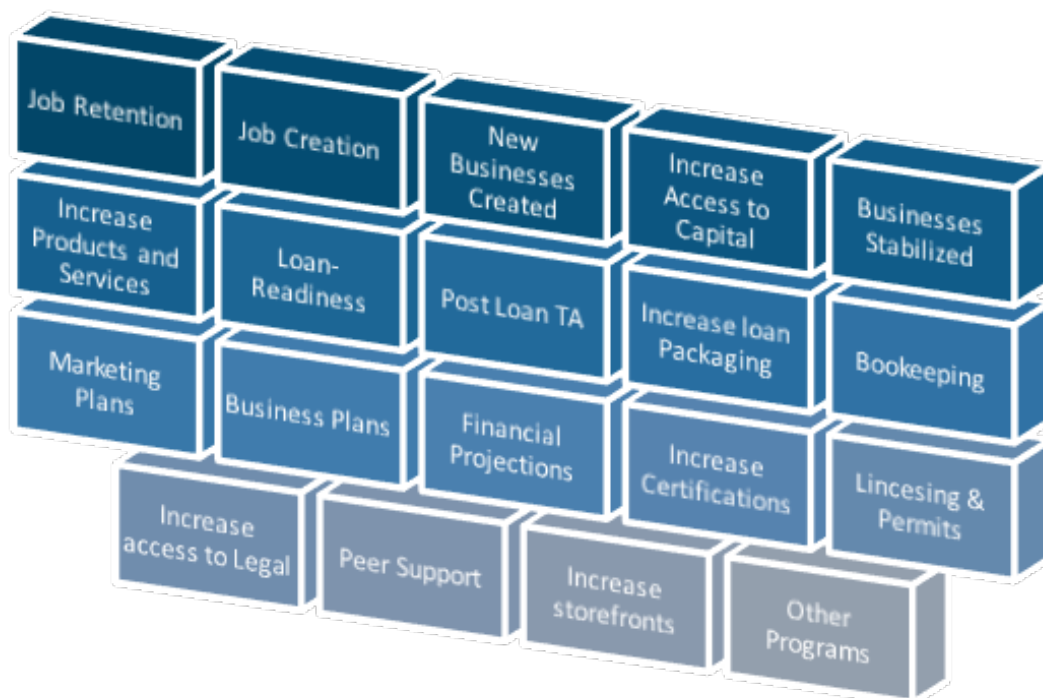
APPENDICES

Appendix A - Organizational Budget Form

Appendix B - Transactional Report *(subject to changes)*

Appendix C - Expense Report *(subject to changes)*